



# CADDIS Connections

*Department of Developmental Services*

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## UAT Update

Inland and Valley Mountain Regional Centers' Pilot RC testers continue to perform CADDIS UAT (User Acceptance Testing) Cycle 1, with support from the CADDIS Project Team. The current focus is to execute Business Event Scripts across all modules (Consumer, Provider/QA, Fiscal, Trust and POS) of the CADDIS application. Testers enter all incidents identified during UAT activities into the web-based application CITINGS (CADDIS Incident Tracking System). The status of all unresolved incidents is reviewed daily by the joint Pilot RC - CADDIS Management Team.

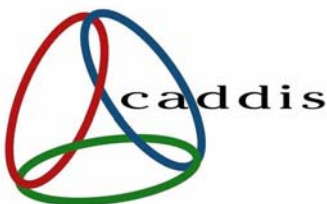
UAT Cycle 2 is scheduled for 10/3/05 - 11/11/05. Cycle 2 will include parallel processing of CADDIS functions with equivalent legacy (current) system functions. The CADDIS Project Team will complete a new conversion of Inland and Valley Mountain data as part of Cycle 2 to support the parallel processing efforts. Additionally, as part of Cycle 2, the CADDIS Project Team is working to include a new set of performance and application enhancements and batch processing capability for a few of the Fiscal transactions.

## Ad Hoc Report Writing Training Classes

The first two of four Ad Hoc Report Writing training classes for the Regional Centers have been scheduled. RCs are invited to the sessions by geographic location and Go-Live date. The last two sessions will be scheduled for January, 2006.

### Northern CA

Host Site	Dept. of Technology Services (DTS) Training Center – Sacramento
Dates	October 12 – 14
Regional Centers	Redwood Coast, North Bay, Central Valley, Tri-Counties, Kern



**Southern CA**

Host Site	San Gabriel/Pomona RC – Pomona
Dates	October 19 – 21
Regional Centers	North LA, Inland, East LA, San Gabriel/ Pomona, San Diego



There are 15 seats available in each three-day class. Each RC is invited to send three participants. If you have any questions regarding this or any other CADDIS training class, talk to your CADDIS Contact.

## What is CADDIS Ad Hoc Report Training?

Ad Hoc Report training focuses on training DDS and Regional Center technology staff who need to develop customized CADDIS reports, using the Actuate eDesigner Professional report writer software. The course is three days in length, with the first day devoted to understanding the CADDIS Data Mart.

Days two and three of the ad hoc reporting course familiarize participants with the Actuate reporting environment, allow them to produce useful reports quickly, and teach them the fundamentals of designing and formatting reports with a high-quality, professional look and feel.

## Who is the right participant for CADDIS Ad Hoc Report Training?

The right participant should:

- Have an overall understanding of existing Regional Center reporting processes and report content
- Have experience with database reporting concepts such as grouping, sorting, and totaling
- Have experience with data formatting concepts, which can be either Microsoft Excel or desktop report writing
- Have a willingness to teach Actuate ad hoc reporting functions to others at their Regional Center

## What computer skills do they need?

The participant must have a strong understanding of Microsoft Windows experience and comfort using some kind of application development applications, including environment. The minimum level of experience includes:

- An intermediate level of experience using desktop report writers such as Crystal Reports or Microsoft Access, or experience coding reports in a language such as RPG.
- A beginner level of experience with relational databases, which can be IBM DB2, Oracle, SQL Server, Microsoft Access, or a comparable database product.
- At least introductory exposure to the Structured Query Language (SQL) for querying databases.
- Experience with any kind of development environment (FrontPage, Visual Basic, RPG) is a plus.

## What are the training objectives?

Participants with the recommended background who complete the training should be able to do the following:

- Navigate the CADDIS Data Mart by having a basic understanding of subject areas such as Consumer, Provider, Authorizations, and Fiscal.
- Use the Actuate eDesigner report writer software to create ad hoc reports.
- Generate reports with Actuate Wizards.
- Access and query CADDIS Data Mart using Actuate.
- Build and modify ad hoc reports with Actuate components.
- Apply professional report formatting techniques.
- Manage report output from a Windows desktop.



## System Administration Training – *What's It All About?*

System Administration training focuses on the setup and update of user roles, groups and profiles within the CADDIS Application. It also provides an introduction to CADDIS navigation, system setup, configuring and updating workflows, alerts, and Fiscal & Trust administrative setup in CADDIS.

The System Administration training is a two-day class for two RC participants. Following the class, the Regional Center's environment validation will be conducted.

System Administration training does not include any RC networks, servers or Operating System (OS) administration functions. The person attending the training should have an overall understanding of regional centers and office-specific business processes and procedures. He/she should also understand how the regional centers administer the DDS and RC programs and policies, as they relate to his/her functional area. The participant must have a strong understanding of Microsoft Windows applications, including experience and comfort using computers in an Internet Explorer 5.5 (or higher) environment. An introductory exposure to the Structured Query Language (SQL) is a plus.



### RC Readiness Profile

### ***On The Move***



*This article is the third in a series, profiling how individual RCs are preparing for CADDIS. If you want to share what your RC is doing, talk to your CADDIS Contact about being included in the series.*

At the Eastern Los Angeles Regional Center (ELARC), everything is moving ahead as the staff prepares for CADDIS. The RC's CADDIS Team has enlisted the assistance of staff at all levels throughout the RC, including management staff, in preparation for their conversion. Staff attended training sessions at neighboring RCs and formed various work groups to effectively handle the RC's activities as they ensure their Readiness for CADDIS.

ELARC has found that the Readiness Review Checklist works well at keeping everyone on track and in communication with each other throughout this process. They have established work groups specific to each of the Business Process Planning (BPP) flows and are currently evaluating each to determine how it can best be utilized by the RC. Their 120 day Readiness meeting is scheduled for the end of September and they feel confident they will be "Ready".

The RC has identified their trainers (CCTs) and scheduled the end user trainings into January, 2006. In the first week of October, the RC will conduct an all agency staff meeting, which will be their official Kick-Off for CADDIS Readiness.

For more information on ELARC's Readiness activities in preparation for CADDIS, please contact either Lily Ortega at [lortega@elarc.org](mailto:lortega@elarc.org) or Don Daniels at [ddaniels@elarc.org](mailto:ddaniels@elarc.org).

## **CADDIS Project Staff List**

Have you ever been in a meeting and heard a name associated with the CADDIS Project, but didn't know who the person was or what role they played? Now you can find out! The list below shows the major Project players, listed by Team, and their role on that team.

Organization	Name	Team(s)	Title
Deloitte	Talwar, Dhiraj	Application Implementation	Project Manager
Deloitte	Prabha, KR	Application Implementation	Project Manager
Deloitte	Sharma, Sandeep	Application Implementation	Team Lead
Deloitte	English, Karla	Business Process Planning	Team Lead
Deloitte	Lau, Christine	Business Process Planning	Team Member
DDS	Wheeler, Tamara	Communications	Team Co-Lead
DDS	Yuen-Gong, Jeanne	Communications	Team Member
Deloitte	Bunn, Matt	Communications	Team Co-Lead
DDS	Gibbs, Viki	Conversion	Team Co-Lead
Deloitte	Bowers, Jason	Conversion	Team Co-Lead
Deloitte	Li, Colleen	Functionality and Requirements	Trust Lead
Deloitte	Harris, Ron	Functionality and Requirements	Team Lead
		Functionality and Requirements	POS Lead
Echo Group	Staples-Smith, Susan	Functionality and Requirements	Fiscal Lead
Echo Group	Smith, Donley	Functionality and Requirements	Consumer Lead
		Functionality and Requirements	QA Lead
		Functionality and Requirements	Option Lists Lead
Deloitte	Nunan, Matt	Functionality and Requirements	Consumer Lead
		Functionality and Requirements	System Administration Lead
Deloitte	Koschel, Terry	Infrastructure	Team Co-Lead
DDS	Kassis, Mike	Infrastructure	Team Co-Lead
DDS	Weimer, Jacque	Infrastructure	Team Member
DDS	Hibbert, Beth	Infrastructure	Team Member
DDS	Copren, Bob	Infrastructure	Team Member
Equanim	Brown, Kevin	IV&V (Independent Validation and Verification)	IV&V Manager
DDS	Gibbs, Viki	Option Lists	Team Member
DDS	Humphrey, Beverly	Project Management	IS Deputy Director
Deloitte	Long, Stephani	Project Management	Project Partner
Echo Group	Norris, Suki	Project Management	Echo Project Manager
DDS	Pipoly, Becky	Project Management	Program Manager
Deloitte	Kelly, Kevin	Project Management	Advising Partner
Deloitte	Pollock, David	Project Management	Project Director
Eclipse	Messamore, Alan	Project Management	Project Mgmt. Consultant
Deloitte	Williams, Desmond	Project Management	Project Administrator
Deloitte	Bunn, Matt	RC Readiness	Team Lead
Deloitte	Bachi, Greg	Reports	Team Lead
DDS	Maus, Judi	Subject Matter Expert (SME)	Team Lead
DDS	Jew, Terry	Subject Matter Expert (SME)	Team Member
DDS	Rogers, Barbara	Subject Matter Expert (SME)	Team Member
DDS	Holden, Cheryl	Subject Matter Expert (SME)	Team Member
Deloitte	Koschel, Terry	System Administration	Team Co-Lead
Deloitte	Shah, Paresh	Technology & Performance	Project Manager
Deloitte	Choudhury, Chetan	Testing	Team Lead
Deloitte	Crawford, Darlene	Training	Team Co-Lead
DDS	Wheeler, Tamara	Training	Team Co-Lead
DDS	Holden, Cheryl	Training	Team Member

## *Did You Know?*

Did you know these important facts about the CADDIS Business Process Planning (BPP) world?

After CADDIS is implemented, your business processes may change. How they may change, and planning for these changes, will be determined by conducting four types of BPP sessions:

- BPP Kickoff Meeting – this is the initial meeting of your RC's BPP Team
- To-Be Sessions - the BPP Team reviews “as-is” (current) business processes and compares those processes to the standard “to be” (CADDIS) processes
- Gap Analysis Sessions - The BPP Team identifies “gaps” between the “as-is” and “to be” processes and makes changes (process customization)
- Validation Sessions – the customized process is validated to ensure that it works



You can use the information available on the CADDIS website to work on your customization and gap analysis. Under “What's Current”, you will find the link to the Standard Business Process Models. Here, you will find the To-Be flows, screen shots, and recommendations proposed by the participants who attended the To-Be Sessions.

There are four main types of process customizations:

- Process/Training Issue
- HR/Staffing Issue
- Configuration Issue (Workflows, Alerts, Ad Hoc Reporting Requirements, Security, etc.)
- Facilities/Equipment Issue

The CADDIS BPP team is available to visit your RC to help you get started with your customization work. If you have any questions about the BPP process, please contact your RC's CADDIS Contact.

## *FAQ*

### **“ALL IS NOT LOST”**

**Q.** *Will the SIRs and Title 19 TCM notes convert into CADDIS? If yes, is there a character limit?*

**A.** Everything currently in the legacy system will convert into CADDIS, including SIRs and Title 19 TCM notes. Because there is no character limit to the amount of information that will convert, historical information will be preserved.

*Do you have a suggestion for a  
CADDIS Connection article or FAQ?*

*We want to hear it!*

*Please send your suggestions to  
Tamara Wheeler, DDS CADDIS Project, at [twheeler@dds.ca.gov](mailto:twheeler@dds.ca.gov)*

